Inform Upgrade v20

Presented by Jim Messina

Thank you for joining this webinar! We hope you found this session valuable and gained valuable insight to the new features offered.

*Following are the answers to all of the questions posed during the session. For additional guidance, be sure to check out our vast, context-sensitive **Online Help within Inform** by pressing the F1 key, or by choosing the **Help Menu** at the top of the **Inform** Function Bar.*

You can also contact our Support Team by visiting our Help Center at DDIUsers.com or calling 203-364-1200.

Dashboard

What happened to the Salesperson Dashboard?

The functionality of the Salesperson Dashboard has been replaced by the new KPI's. Salespeople should add the Open Orders Grid and the Accounts Receivable KPI's to replicate their old dashboard. In a future version a new KPI will be added that replicates the Performance tab.

Note that the menu option for Salesperson Dashboard no longer functions when using the new Inform Home Screen. It will be removed in a future version, but has been left in for now in the event you disable the new home screen.

How do I disable the new home screen?

Navigate to Utilities > Beta Manager and uncheck Main Form. Next time you log in the new home screen will be disabled. This applies to all users company wide. Each time you upgrade the home screen will be

re-enabled. Note that this is temporary to allow time for staff training; it will be made permanent in a future version of Inform.

Can the Dashboard tiles be limited to the user's branch, instead of the entire company?

Currently no, though salespeople can only see orders for their own accounts.

Can the Open Order KPI only show orders for the specific sales rep?

Yes, in the User Master, assign Salesperson Codes to specific users. This will default their KPI to only display those accounts. This applies system wide, limiting the ability to view or edit orders to linked accounts only.

How do you set the Calendar to default?

The Calendar is treated like all other KPI's and can be added from the Dashboard tile menu.

Can you restrict access to Dashboard tiles, specifically those that show costs?

Yes, each KPI has its own Access Level. In the Access Levels screen, under the Analytics tab, review the levels that are named "KPI."

Can pop up notifications be disabled?

No, at the moment the mail notification pop up cannot be disabled. You can set users to receive Web Mail instead, which sends notifications to your outside email (which would eliminate internal popup notifications).

Can we setup Dashboard defaults based on user groups?

No, all Dashboards are user specific and must be set individually.

Are there any Keyboard Shortcuts?

Yes, press the CNTRL + TAB keys to cycle through your open tabbed windows.

How do I reopen a Dashboard if I accidentally close it?

All KPI's including the Calendar are available by clicking the Dashboard Tiles sidebar, located on the right-hand side. Simply drag and drop the KPI back onto the home screen.

Can I resize the Dashboard Tiles?

Yes, in the upper right corner of each tile is a window resizer icon (left of the X icon that closes the tile). You can click this several times to change sizes. The sizes will vary based on how many tiles are currently placed on your Dashboard.

Sales Order

Can a Primary Vendor be set when using the Excel Import?

No, but this will be added in a future version of Inform.

Can multiple orders be imported at once?

No, the import is specific to the current order you are working on.

Is there a limit to the number of characters a Product Description can be?

No, the import does not limit the number of characters, though 60 characters is the standard two-line description that prints on most documents.

Can you import images that will then appear on our eCommerce site?

Yes, the import allows for image URL's which will immediately appear on eCommerce. However, it is not possible to import local image files. For that please use Product Import.

Is the import feature available in MobiOrder?

There are no current plans to add this feature to MobiOrder.

Are there premade templates for Excel that you can provide?

No, the concept behind the import is that you can format your spreadsheet anyway you want, so there is no need for a standard template. Simply map the fields you wish to import. If your vendor or content provider has a standard template, then you can save your mapped fields for future reuse.

Can product creation be disabled while still allowing Excel Import?

Users who have access to the import will have access to create new products, as this feature is tied to existing Access Level *FAST PRODUCT ENTRY IN S/O*.

If you wish to prevent product creation consider using the Copy/Paste import method which allows you to copy the Qty, Product, & Price, and paste it directly into order entry.

Do these custom forms replicate the existing default forms? Do they support lot pricing, assembly components, etc?

The custom forms do not attempt to replicate the default forms. They are intended to be customized based on your needs. Our current template includes Item Groups but can be modified to show/hide any order details you'd like.

Can I make a custom form my new default form?

Not yet. We intend to expand on custom form capability in the future, though not all details have been finalized.

Can I create multiple custom forms, for example one with images and one without?

Yes, you can create as many forms as you need and all will be available in the Layout drop down on the Final tab of the order.

How do I hide prices on the Custom Form?

Edit the Layout in Advanced Report Writer and either delete the pricing fields or set the fields to be hidden.

Do bullet points now work in Web Descriptions, or does that require eCommerce?

Yes, you can add HTML into your web descriptions which will appear on eCommerce, and are also supported in our template Custom Form.

I'd like to design a custom form but I am unfamiliar with Advanced Report Writer. Does DDI provide assistance with this?

Yes, our professional services team can assist or build forms for you. Please contact support with your specifications to receive a quote.

Is the Auto Attach capability available for invoices?

Not at this time. This feature was designed for when the Send button is manually clicked on an order, to help track revisions and changes made over time. It's not intended to track outbound sent messages.

Will the Archive Copy track who the order was sent to?

No, as stated above the intent is to keep reference copies of revisions on orders. It does not track sent messages.

Does the Continual Scan method (barcode scanners) work with receiving as well?

This feature was designed for Sales Order Entry only. If you wish to scan receive please consider our Warehouse Management System.

Accounting

Can you use Mass Change to blank out the default Ship To?

We are currently evaluating the possibility of adding this to Mass Change, but as each customer has different Ship To's, this may not be possible to do.

When making a new customer, can the Ship To default to blank?

At the moment this is not possible.

What happens in MobiOrder when the customer has a blank default Ship To?

MobiOrder will continue to default to the first ship to on file.

Can tracking numbers be manually entered outside of integrations with UPS & FedEx?

Yes. In the Ship Via setup, add a Carrier URL, which should be a link to the freight companies tracking page. Once set, in Shipment Confirmation you can manually enter a tracking number.

Does the Cash Receipts by Invoice support credit cards?

Yes. We demonstrated a check payment but any form of payment can be accepted.

Can both Cash Receipts screens be used at the same time?

Yes. Both screens save to the same Cash Receipts batch. You can post your batch from either screen.

Can I import invoice numbers from a spreadsheet?

At the moment this is not an available feature of the Cash Receipts by Invoice.

How can we enter individual check numbers from different customers?

The check number and amount are entered first, prior to entering the invoices. The purpose of the "By Invoice" screen is to allow one check to pay down multiple customer accounts. It's a faster method of entry than the standard Cash Receipts, though either screen can be used to accommodate this.

What happens to Deposit Transfers performed after I close the month?

In addition to selecting the Date (which will be the date of the Journal Entry), you also have the ability to select the Accounting Period in which to post the journal entry.

Inventory & Purchasing

Can demand be excluded on a product level?

On a per sales order basis, it is possible to not update the demand. If you are trying to never record demand (to hide the item from projections) it may be better to set the product to Non-Stock, or set your Min Stock Qty to 0.

Warehouse & Order Fulfilment

Can our Item Groups print out on the labels?

Item Groups do not print out on product labels, but they will print out on Staging Labels. Use the Sales Order Staging screen located in the Warehouse menu and choose the STG label format.

What contact receives the Auto Emailed Ship Confirmation (WMS)?

The confirmation is sent to the Ordered By contact. If this is blank (or the contact has no email address) it will then be sent to the Ship To contact. If that fails, it will then be sent to a Sales contact, then Accounting contact, and finally the email set in the Customer Master.

Can I set a date range on the Order Picker Progress screen?

Not currently. This is intended to track today's order picks, so it is date specific.

Do I need to do anything to enable the Order Picker Progress screen?

No additional steps are necessary. Simply open the screen from the Warehouse menu. This screen is available to all users, but greatly enhanced for subscribers of the Warehouse Management System, who can see the pick status of orders in real time.

Can I utilize Stock Transfer Spawns if I'm using WMS but not using the scanners for transfers?

Yes. Inform supports the spawns, even when maintaining bin level inventory. The WMS scanners do not yet support the spawned orders but will in a future version.

Miscellaneous

Does Inform support high resolution tablets?

This is difficult to answer without knowing the specific device and resolution. Please contact support with the specifics.

In general, we recommend setting the DPI to 100% for optimal viewing. There have been some recent enhancements to better support 4k monitors.

When will the Office 365 integration be completed?

This is a complex integration that is currently in active development. We do not have a planned release date at this time.

Is v20 compatible with Windows 7? What are the system requirements for the new version?

The requirements to run Inform v20 have not changed from v19, and is therefore compatible with Windows 7, though DDI has not performed extensive testing on this operating system.

Microsoft is discontinuing support for Windows 7 and Windows Server 2008 in January. Inform will continue to operate, but for security purposes you should consider migrating as soon as possible.

You can review our Hardware Recommendations here.

Can you disable Length, Width, & Height from the Sales Order?

You cannot hide these from the default print layout but this can be achieved using Custom Forms.

Why was the User Community removed? Are there plans to bring it back?

Earlier this summer we launched our new Inform Help Center which provides access to news, help, and FAQs as well as customer support. The Community forum was retired. We are currently evaluating requests to add a new Community to the Help Center, but there are no plans to bring this feature back at this time.